

**Enterprise Content Management Workgroup**  
**Minutes**  
**July 26, 2017**  
**1:00 PM**  
**Cogswell, Room 151**

**Attendees:**

Elle Arredondo, OPI  
Carol Monroe, OPI  
Marlo Conrady, SITSD  
Karin Ohlin, SITSD  
Audrey Hinman, SITSD  
Kim Warren, DLI

Patrick Miller, DOR  
Carol Schopfer, DOR  
Steve Evans, Hyland  
Rich Gaul, Hyland  
☪ Larry Krause, DOC

**Staff Present:** Wendy Jackson, Sarah Mitchell

**Guests Present:** Natacha Bird, Boah Kang, Julie Feldman, Julie Lake, Brandi Pierson, Nicholas Nelson, Kellee English, Frank Cornwell, Anne Marie Moe, Jo Morand, Teri Juneau, Craig Woods, Heidi Sampson, Ginger Pfankuch, Angela Heffern, Jackie Furlong

☪ **Real-time Communication:** Mara Gruber, Paula Loving, Mary Noak, Aaron Mook, Miranda Needham, Bruce Brensdal, Whitney Williams

**Welcome and Introductions**

Elle Arredondo welcomed everyone to the July 26, 2017 Enterprise Content Management (ECM) workgroup kickoff meeting. All members and guests were introduced.

**Minutes**

**Motion:** Judy Kelly made a motion to approve the May 31, 2017 minutes. Carol Schopfer seconded the motion. Motion carried.

**Business**

**Email Notification without iScript Solution Update**

Patrick Miller shared an update regarding the iScript email notification solution. Mr. Miller has established a super queue to funnel content into various stakeholder's inbox. Previously, this super queue would not notify stakeholders of content added to their subqueue. The objective of Mr. Miller's research was to establish a system for sending notifications to stakeholders when content is added to their subqueues. The ECM team within the State Information Technology Services Division (SITSD) developed a script which allows notifications to be sent without using an iScript. This script utilizes two separate commands to generate two notifications. The first notification informs the stakeholder of updated content in their subqueue. The second notification is delivered after five days if the content has not moved. For further information on how to use this solution, please contact Mr. Miller at [patmiller@mt.gov](mailto:patmiller@mt.gov).

**Script Sharing Site Process Discussion**

Ms. Arredondo provided a brief update regarding the ECM script sharing site located at [https://ent-sp1.mt.gov/sites/ecm/layouts/15/start.aspx#](https://ent-sp1.mt.gov/sites/ecm/layouts/15/start.aspx#/). This site is maintained by Ms. Arredondo and Judy Kelly. This site will allow for the sharing of scripts that have privileged or confidential content removed. Questions regarding the script sharing SharePoint site should be directed to Ms. Arredondo at [earredondo@mt.gov](mailto:earredondo@mt.gov).

Karin Ohlin clarified SITSD is unable to share scripts on behalf of agencies. These scripts must be shared by the agencies who own them once sensitive data has been removed.

Steve Evans confirmed Hyland is unable to legally share scripts created for one agency with another. Agencies wishing to utilize a solution developed for another agency should approach that entity directly.

**OPI AP Solution Demo**

Ms. Arredondo provided the workgroup with a copy of the Office of Public Instruction (OPI) Accounts Payable (AP) solution workflow. This approval process mirrors the paper process, but in electronic form. The e-Form was developed to resemble forms used by the State Accounting Bureau Human Resources System (SABHRS). SABHRS continues to be the system of record for OPI. This solution serves to reduce the margin of error, increase validation checks, and further automate the process to allow AP managers to focus on higher level priorities. OPI's documentation process will entail both paper and electronic for the first few months following the launch of this solution. After six months, OPI will scan documents and purge the physical copies. Ms. Arredondo provided a demo of the OPI AP solution. This process may be completed by a single individual or allocated to multiple individuals for processing, validation, and approval. In the processing phase, scanned documents are reviewed for Quality Assurance (QA) and data is entered within the document keys. Once data entry is complete, a validation check occurs before the form can be moved forward through the process. The General Ledger (GL) distributions line is customizable to allow for multiple GL distributions per invoice. The number of queues available to specific users is customizable according to access and security needs.

The Approval Queue is utilized to route the form to users for review and approval. This workflow can be customized to allow approval from multiple users simultaneously. The forms are then reviewed by the AP Manager to ensure data accuracy. If errors are detected, the AP Manager will return the form to the AP Technician with a note outlining required changes. Once the form is approved by the AP Manager, final validation is selected. Final validation includes behind the scenes data verification prior to the form being sent to SABHRS. A script is run nightly to send all completed forms to SABHRS. This submission functions the same as logging into the SABHRS system to approve the payment. SABHRS will provide Payment Update Data to OPI informing them of applied payments. Forms in the early stage of processing will be stored in the Awaiting Payment queue until they have been completed. The Awaiting Payment Error queue stores forms with incorrect or duplicated data. A Validation Error Queue is used to store forms with validation errors. Designated users will receive error notifications when forms are sent to the error queues. Once Payment Update Data is received from SABHRS, the form is sent to the AP Complete Queue which functions as document storage for all completed AP e-Forms. Individuals may be granted view only rights for the AP Complete Queue.

A specific e-Form is being considered by OPI to address urgent invoices. Currently, urgent payments can be made in SABHRS using an Application Plan. Once the payment has been made in SABHRS, the scanned documentation from ECM can be linked to SABHRS and the values will auto populate.

### **OPI AP Solution Technical Components**

Ms. Arredondo reviewed technical components of OPI's AP solution. OPI relied heavily on the expertise of Lexmark, SITSD, and the SABHRS Development Team to create this solution. The design document for this solution does not fully reflect the development process as some aspects of this document have changed. Next steps for OPI will include expanding this solution into contracts and school finance audits. SABHRS personnel were helpful and supportive during the development of this solution. This cooperation has paved the way for other agencies to work with SABHRS to automate their AP processes.

Rich Gaul reviewed document signing capabilities within Perceptive. The digital signatures applied within Perceptive are a legal signing event, but is only legally acceptable within Perceptive. Individual seeking information regarding the DocuSign contract should contact Linda Kirkland at [lkirkland@mt.gov](mailto:lkirkland@mt.gov).

### **Technical Issues, Problems and Solutions Discussion**

Boah Kang voiced concerns regarding customer support and the amount of time involved in securing assistance. In addition, customer support technicians demonstrate a lack of resourcefulness in problem solving.

Mr. Evans stated customer support is a known issue Hyland is actively working to improve. Agencies experiencing urgent issues, who cannot secure timely and accurate customer support, should contact Mr. Evans at [Steve.Evans@kofax.com](mailto:Steve.Evans@kofax.com).

Ms. Kang commented the Enterprise search function is not working properly.

Mr. Gaul stated this issue is related to the architecture of the database. SITSD is working with the Hyland Professional Services team to address this issue and reduce negative effects on the user experience.

## **Status of Merger**

Mr. Evans informed the workgroup the merger is complete. The Kofax and Perceptive business units have split. Perceptive has been acquired by TunnelBravo which includes the ECM platform, Hyland OnBase. Perceptive is merging with Hyland OnBase to form a customer driven ECM platform. Jeff Matthews will continue to serve as the account executive for the State of Montana. Perceptive content will be maintained and customers will not be forced to migrate to the Hyland product. Hyland will continue to develop and maintain the Perceptive product.

Mr. Evans reviewed issues regarding the Lexmark Customer Portal. The portal migrated from Lexmark to the Kofax portal on June 30, 2017. This migration resulted in 10 days of downtime for the portal. This issue has been resolved, and users are once again able to view cases. This site will be migrated onto the Hyland OnBase customer service site September 1, 2017. Individuals experiencing issues with the Customer Portal should contact Mr. Evans at [Steve.Evans@kofax.com](mailto:Steve.Evans@kofax.com).

**Action Item:** Mr. Evans will notify the workgroup when Hyland email addresses are updated.

## **Standing Reports**

### **State Information Technology Service Division (SITSD) - FileNet migration and the ECM environment update**

Marlo Conrady informed the workgroup SITSD is working to develop an Enterprise search. SITSD is also developing the display customers will use to see their data. Enterprise search training for key customers will begin shortly. Work is also being conducted regarding the establishment of a sandbox for information and script sharing.

The Department of Labor (DLI) Employment Relations Division (ERD) Perceptive solution went live on Monday, July 24, 2017. This involved a FileNet and Share Drive migration and required an elevated level of support. Meetings continue regarding the speed of integration between ERD applications and Perceptive content.

**Action Item:** CIO Support Staff will add Unemployment Insurance (UI) Conversion demo to the September 27, 2017 meeting agenda.

**Action Item:** SITSD migration of UI presentation will be added to the September 27, 2017 meeting agenda.

## **Q&A**

Mr. Evans informed the workgroup the Inspire Conference will be held in April 2018. A Hyland Conference will be held December 17 through 21, 2017 in Las Vegas, Nevada. Perceptive content customers will be invited to attend this event. Going forward, the Hyland and Inspire Conferences will merge.

## **Discussion**

### **Member Forum**

None

### **Public Comment**

None

## **Future Agenda Topics**

ECM Sandbox

Demoing another solution – UI or ERD with independent contract

Please send agenda suggestions to Wendy Jackson at [WJackson@mt.gov](mailto:WJackson@mt.gov) or Ms. Arredondo at [earredondo@mt.gov](mailto:earredondo@mt.gov).

## **Next Meeting**

September 27, 2017

1:00 PM to 3:00 PM

Mitchell Building, Room 218

## **Adjournment**

The meeting adjourned at 2:34 PM.